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From Hustle to Hands-Free:

The Small Business Guide to Automation

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Free Up Your Time, Without Giving up Control

You're juggling a million things: emails, follow-ups, invoices — all while trying to grow your business. It feels like there aren't enough hours in the day.

And while we can't clone you (yet), we can show you how automation can lighten the load.

With just a few simple automations, you can start saving time, streamlining your workflows, and growing your business — all without hiring anyone or working around the clock.



Here's what's inside:

- What automation is and what it isn't
- The top 5 automations to start using today
- How to get started with automations

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What Is Automation?

Automation doesn't have to be complicated. It's simply using systems to do repetitive tasks for you — like sending appointment reminders, lead follow-ups, or invoices.

Think of it as putting busywork on autopilot, so you can focus on what you love.



The Misconceptions

- It's impersonal
- It's complex
- It's expensive
- It's robotic

The Truth

- It creates thoughtful, personal touch-points
- It's simple to set up and run
- It saves you money by doing more with less
- It runs quietly in the background, freeing up your time

If it's repeatable, it's automatable.

By the end of this guide, you'll have a clear path to start automating the right parts of your business — giving you more time, less stress, and a system that works even when you're not.



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The Top 5 Automations to Start Using Today

If you were to search “the top automations for small businesses,” you’d be inundated with dozens of options.

But here's the truth: you don't need to automate everything right away.

Start with these five simple, high-impact automations. They're easy to set up, save you time, and make a noticeable dent in your daily to-do list.



AUTOMATION #1

Immediately follow up with new leads

What it is: This automation sends a personalized email or text when someone fills out your website’s contact form.

Why it matters: When someone reaches out, they’re interested right now. And they’ll likely move on to a competitor if you wait too long to reach out. With this automation, you can instantly respond, even when you’re busy.

What it solves:

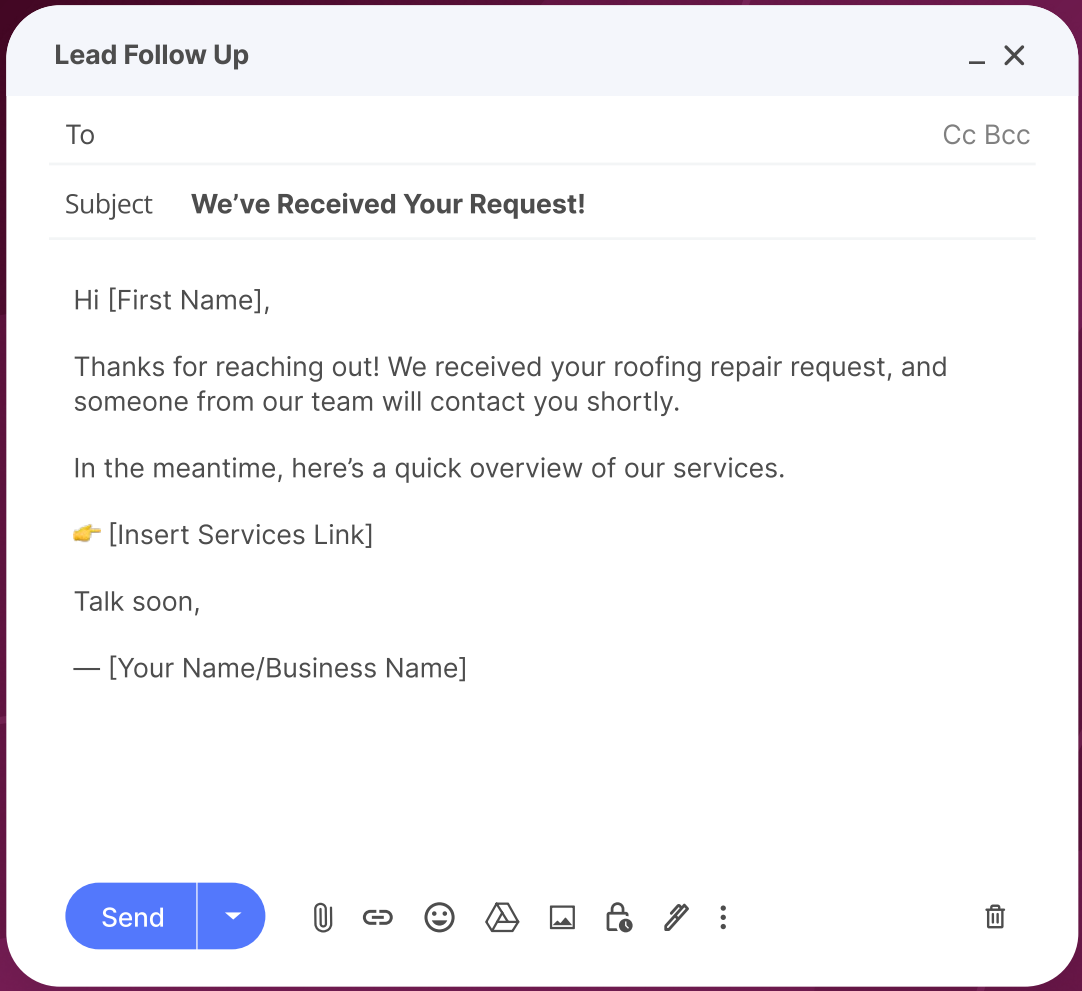
- Leads slipping through the cracks
- Time spent on manual follow-up
- Having to monitor your inbox for leads throughout the day

What it looks like in action: When someone fills out a contact form on your website, they’ll automatically receive a message to confirm you've received their information and let them know what to expect next.

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EMAIL TEMPLATES

Automation #1



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AUTOMATION #2

Appointment scheduling and reminders

What it is: This automation makes it easy for customers to book appointments online and automatically sends confirmations and reminders. You may have experienced this firsthand after booking a doctor's appointment, or scheduling your car for service, for example.

Why it matters: Sending automated reminders helps reduce no-shows and eliminates the back-and-forth hassle of scheduling. It also helps to keep your team fully booked.

What it solves:

- Missed or forgotten appointments
- Time wasted on scheduling and rescheduling
- No-shows that cost you time and money
- Manual follow-up when someone cancels

What it looks like in action: Send customers a link to your online calendar and let them select a date and time that works with their schedule. Once they book, use automation to send confirmation and reminder emails and texts leading up to the appointment. If someone cancels, you can even create an automation to send another follow-up message to nudge them to reschedule.

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EMAIL TEMPLATES

Automation #2

Appointment Confirmation Email

To Cc Bcc

Subject **Your Appointment is Confirmed — We'll See You Soon!**

Hi [First Name],

Thanks for booking your appointment! We're all set to meet at [Appointment Details].

If you need to make any changes or reschedule, you can do so anytime using the link below:

👉 [Insert Booking Link]

You'll also receive a reminder before your appointment.

We're looking forward to seeing you!

— [Your Name/Business Name]

Send

BONUS TIP:

Include a reschedule link in your reminders like the one shown above to make it easy for customers to adjust their time without missing their appointment.

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The Top 5 Automations to Start Using Today



AUTOMATION #3

Gauge satisfaction and ask for referrals and reviews

What it is: After a service visit or a job is complete, this automation sends a quick satisfaction survey and automatically follows up based on the customer's response. It can also ask for reviews and referrals from happy customers.

Why it matters: Customer feedback is an invaluable source of intel. Whether it's praise or a problem that surfaced, knowing how your customers feel can help you improve, grow, and build trust. In addition, collecting positive reviews can boost your reputation and help leads choose you over competitors.

What it solves:

- Manually having to ask each customer for a review
- Unhappy customers slipping through the cracks, never to return again
- Having to guess how you're doing and what customers think

What it looks like in action: Shortly after completing a job, this automation sends a thank you message plus a quick survey (see the example on the next page). From there, you can add automation based on people's answers:

IF THE RESPONSE IS NEGATIVE:

A task is created for someone on your team to follow up. Quick outreach can turn a bad experience into a second chance.

IF THE RESPONSE IS POSITIVE:

The automation sends another thank-you email and asks for a review or testimonial.

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EMAIL TEMPLATES

Automation #3

Review Request Email

To Cc Bcc

Subject **Thank You!**

Hi, [First Name]!

Thank you for choosing us for your recent service – we really appreciate the opportunity to work with you.

We'd love to hear how we did.

How satisfied were you with your recent service?

😃 Completely satisfied

😐 Neutral

😕 Not satisfied

— [Your Name/Business Name]

Send

BONUS TIP:

When a customer submits a referral, use another automation to create a task for you to call the new contact directly. Why a phone call? Because emailing someone without their permission can land you in the spam folder. A quick, friendly call builds trust and keeps your emails deliverable.

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The Top 5 Automations to Start Using Today



AUTOMATION #4

Generate repeat business

What it is: This automation sends timely follow-ups to past customers, reminding them to book their next service or reorder products — before they even realize they need to.

Why it matters: Your best customers have already said "yes" to you, making it easier to sell to them again. Whether you offer seasonal maintenance specials, recurring services, or products that need replenishing, staying in touch keeps your business top of mind — and keeps your calendar full.

What it solves:

- Customers forgetting to rebook or reorder
- Missed opportunities for repeat sales
- Manually tracking when each client is due for follow-up
- Gaps in your schedule during slower seasons

What it looks like in action: Once a job is complete, an automation timer starts. When the right amount of time has passed — say, six months after an HVAC tune-up or a month after a plumbing inspection — it sends a friendly reminder.

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EMAIL TEMPLATES

Automation #4

Repeat Business Email

To Cc Bcc

Subject **It's almost time for your next service!**

Hi [First Name],

It's about time for your next service. Want to grab a spot on our schedule?

👉 [Insert Booking Link]

You'll also receive a reminder before your appointment. We're looking forward to seeing you!

If you sell products (like filters or pet grooming supplies like shampoo), the message might say:

Your supply might be running low. Need a quick reorder? Use this link to find exactly what you need: 👉 [Insert Shop Link]

If you need any assistance, feel free to reply to this email – we'd be glad to help!

— [Your Name/Business Name]

Send

BONUS TIP:

Include a booking or product link like the example above so people can take action with one click — no searching, no hassle.

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The Top 5 Automations to Start Using Today



AUTOMATION #5

Automatically stay top-of-mind

What it is: This automation helps you stay connected with leads and customers over time — through thoughtful, timely messages that build trust and keep your business top of mind.

Why it matters: Whether it's a new lead who isn't quite ready to use your services or a past customer who might need you again, staying in touch helps you build a relationship and remain top-of-mind — without having to remember to follow up every time.

What it solves:

- Leads going cold due to lack of follow-up
- Customers forgetting about your services
- Time-consuming manual check-ins
- Missed opportunities to build long-term relationships and loyalty

What it looks like in action: You can set up different types of nurturing automations depending on where someone is in their buying journey.

SHORT-TERM NURTURE:

After someone reaches out, send a series of helpful, bite-sized emails over the next few days or weeks. Share tips, FAQs, or a behind-the-scenes look at your services.

LONG-TERM NURTURE:

For leads who need more time, send a monthly email with helpful content, seasonal reminders, or answers to common questions. Include a "Contact Us" link that triggers a task for your team to follow up when they're ready.

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EMAIL TEMPLATES

Automation #5

Short & Long Term Nurtures

To Cc Bcc

Subject **Seasonal Tips**

Hi [First Name],

We're just checking in with a quick tip we thought you'd find helpful:

[Insert a short tip — e.g., "How to prevent frozen pipes this winter"]

If you ever need help or have questions, we're only a click away:

👉 [Insert Contact or Booking Link]

Talk soon,

— [Your Name/Business Name]

Send

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CUSTOMER CHECK-INS:

A few weeks or months after a job is complete, send a friendly message to check-in. Offer a discount or booking link to encourage repeat business.

Subject **Just Checking In — How's Everything Going?**

Hi [First Name],

It's been a little while since we last saw you, and we just wanted to check in and see how everything's going.

If you need anything or you're ready to schedule your next service, we'd be happy to help. 👉 [Insert Booking or Contact Link]

As a thank-you for being a valued customer, here's [insert offer — e.g., "10% off your next visit"]. We look forward to seeing you soon!

— [Your Name/Business Name]

BIRTHDAY MESSAGES:

Ask customers for their birthday (or their birthday month) when they first register with your business. Then, send a personalized message (and a special offer) on their big day. It's a small gesture that makes a big impression.

Subject **It's time to celebrate you!**

Hi [First Name],

We hope you have a fantastic birthday!

Here's 15% off your next service — just our way of celebrating you.

— [Your Name/Business Name]

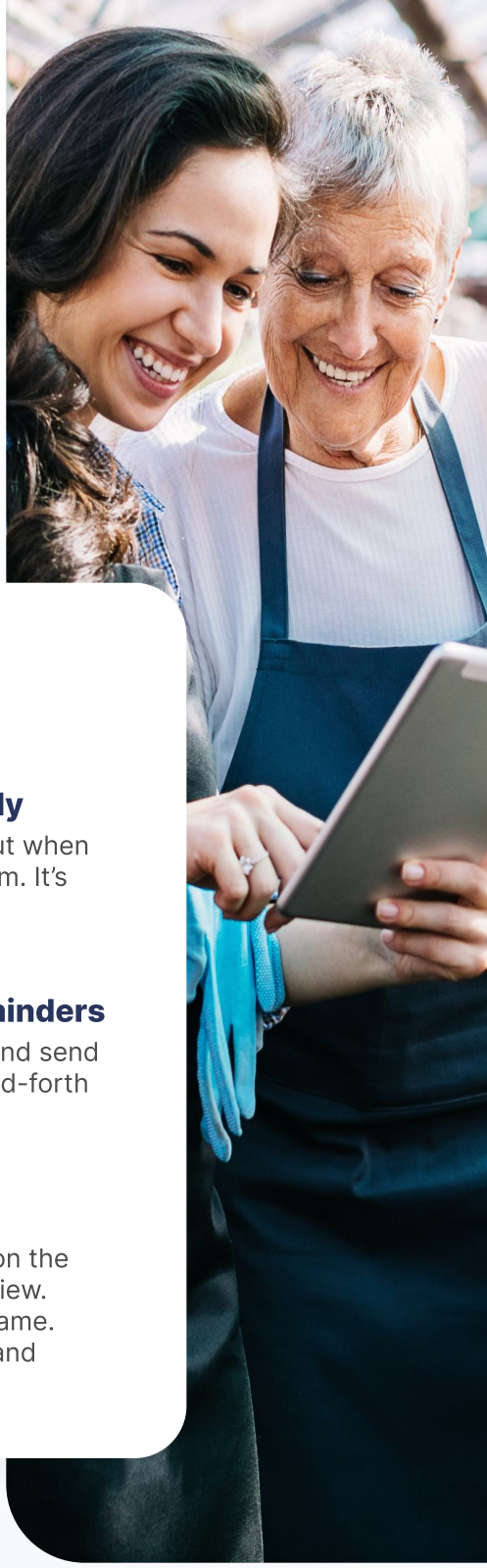
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Not Sure Where to Start?

START SMALL:

Build as You Go.

You don't need to automate everything at once. Start with a few high-impact automations and build from there.



YOUR FIRST 3 AUTOMATIONS:

Here's a simple checklist to get you going.

Follow Up with New Leads Instantly

Set up an automated email or text to go out when someone fills out your website contact form. It's fast, easy, and makes a big impression.

Appointment Scheduling and Reminders

Let customers book time with you online and send reminders automatically. No more back-and-forth or no-shows.

Ask for Reviews After a Purchase

Send a quick survey and follow up based on the response. Happy customers? Ask for a review. Unhappy ones? Ask for a review just the same. Then, get notified to personally follow up and address their feedback.

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Ready to Get Time Back?

You've seen how automation can help you:

- Instantly respond to new leads
- Stay on top of appointments
- Ask for reviews and referrals
- Drive repeat business
- Stay engaged with potential and existing customers

So, what's next?

Meet Thryv® — the powerful marketing and sales platform that helps you get discovered online, land more sales, and grow your business more efficiently.

Why Small Businesses Love Thryv

Thryv was built for small business owners who want powerful tools, without the steep learning curve. Our software makes it easy to get started with automation, so you can save time and focus on doing more of what you love.

It's easy to get started:

Book a 1:1 Demo
Find out how Thryv can help your business with a personalized virtual demo.

Explore Our Automation Tools
Discover what's possible — and how simple it can be.

Get Help Setting It Up
We've got your back with unmatched onboarding and support available 24/7.

Learn more now!

Visit Thryv.com

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Thank you!

Thank you for downloading **From Hustle to Hands-Free: The Small Business Guide to Automation** — we hope you found it helpful.

Keep this guide handy as you build out your automations to make sure you don't miss any of the pro tips we've shared.

The sooner you start automating, the sooner you'll save time, reduce stress, and grow your business.

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